TOTAL WEALTH PLANNING

ASSOCIATE WEALTH ADVISOR

Dynamic and growing Wealth Management Firm looking for Associate Wealth Advisor with financial planning and client service focus.

Total Wealth Planning, LLC arranges more than just the money, investment, or retirement aspects of our clients' lives. We serve as a sounding board for personal decision making. We help clients bring all the key elements of their financial life in order and give them more comfort with their long-term financial security.

STATEMENT OF JOB

The Associate Wealth Advisor position provides support to the financial planning and investment management teams. Responsibilities include data gathering, research, plan development, and monitoring/maintaining client data in various software programs. This role also involves being the contact person for a certain number of clients, assisting with meeting preparation and follow-up, problem solving to meet client needs, assisting in answering phones and being a liaison between clients and Schwab. The position will transition into an increasingly active role in interacting with clients via email, phone calls, and meetings, especially in following up and executing senior advisor recommendations.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Financial Planning

- Support financial planning team in client meeting preparation.
- Review and organize new client's financial documentation and develop Total Wealth Plan with assistance of Lead Advisor.
- Updating Total Wealth Plan for client updates.
- Developing expertise using financial planning software and tax projection software
- Run retirement cash flow, tax projections, life insurance needs analysis and college funding analysis.
- Ability to understand client's employee benefit programs including stock option programs.
- Become Lead Advisor for clients $250,000+

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Client Service

- Communicating with clients via phone, email and during client meetings. Documenting these conversations and assigning, completing, and tracking any follow-up actions that result. This position is to be second in line for answering incoming client phone calls. All issues or requests are escalated to appropriate personnel when necessary.
- Completing any necessary paperwork to implement firm investment or financial planning recommendations.
- Accepting and executing various service requests, such as Letters of Authorization, IRA/Roth contributions, journals, and other account servicing needs, then documenting results and when appropriate, communicating results to clients and advisors
- Requesting and processing data – ensure that information requested from clients is communicated to advisors, stored in the client file.
- Work with lead advisors to manage the process of onboarding new clients to the firm with a focus on continuing an outstanding level of attention, care, and communications with new clients.

Character and Qualities

- Excellent attitude and passion for extraordinary client service
- Strong focus on getting details right the first time. Quality over Quantity
- Team Player - Willingness to help other team members
- Follow company policies, especially those regarding ethics and compliance
- Outstanding organization skills and the ability to balance multiple tasks simultaneously
- Flexibility in order to adapt to unforeseen challenges and requests from clients
- Self-motivated and ability to work independently without direct supervision
- Excellent interpersonal skills with the ability and desire to work in a small company office

Experience

- Bachelor's degree
- 2-5 years of experience
- CFP a plus but not required

Please email Joel Musser at joel@twpteam.com